DANCE COUNTS 2012: INTERIM REPORT

A SURVEY OF DANCE IRELAND MEMBERSHIP ACTIVITY AND AUDIENCES

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INTRODUCTION AND HEALTH WARNING

Firstly, thank you to the Dance Ireland Members that contributed information for the 2012 Dance Counts Survey. The results gleaned can only be as rich as the number and detail of responses, and we very much appreciate their time in this regard.

This report is a snapshot and approximation of Dance Ireland's organisation members activity in 2012, and where possible, trends in relation to dance organisation activity in Ireland over the last six years since the first Dance Counts survey. However, it should still not be regarded as scientific, and figures contained within should be treated with caution.

This document reflects information given for the year 2011/2012. Survey respondents were drawn from the 217 Dance Ireland members for that year. In 2012, it was decided to only send the survey to the 26 members of the Organisation category of membership, to ensure an accurate base for comparison with previous Dance Counts surveys, which, since 2007, has focused on the data from 17 organisational members who have responded to the survey each year since its inauguration.

13 of the surveys have been completed and compiled to date, equating to 50% of Dance Ireland's organisational members. While this is a larger percentage of organisational members (the 2010 Dance Counts report was based on 46% of the organisational membership base, and the 2008 report was based on 41% of that year's organisational membership), it is a lower absolute number of respondents than those featured in previous Dance Counts. The previous two Dance Counts reports have focused on the activities of 17 respondent member organisations. The fact that one of those organisations was dormant during 2012, and three others have not yet participated means that any trends and comparisons in this report are indicative rather than absolute.

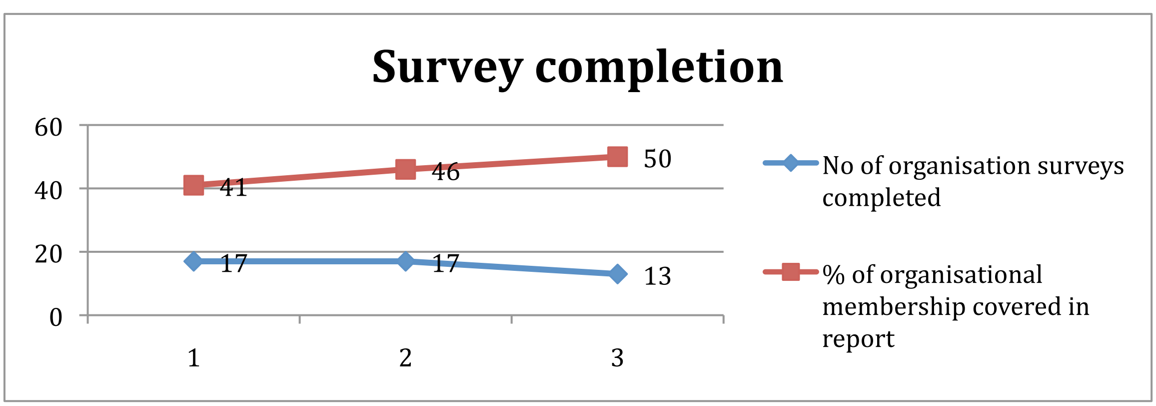


FIGURE 1 – trends in survey completion included in Dance Counts over the three surveys

With this in mind, Dance Ireland acknowledges that this is an interim Dance Counts report for the purpose of the 2013 Dance Ireland AGM. Dance Ireland plan to work with the outstanding respondent organisations to complete their 2012 Dance Counts surveys, at which point a final Dance Counts 2012 report will be published.

As is to be expected when fewer participants respond, the overall dance spend by respondents has dipped significantly in 2012. Turnover – annual spend on dance – is at 45% of what it was in the 2008 survey. Even taking into account the organisations missing from this year's survey (who had a combined turnover of approx €1.2m in 2010) it is clear that organisational dance spend has fallen significantly between 2008 and 2012.

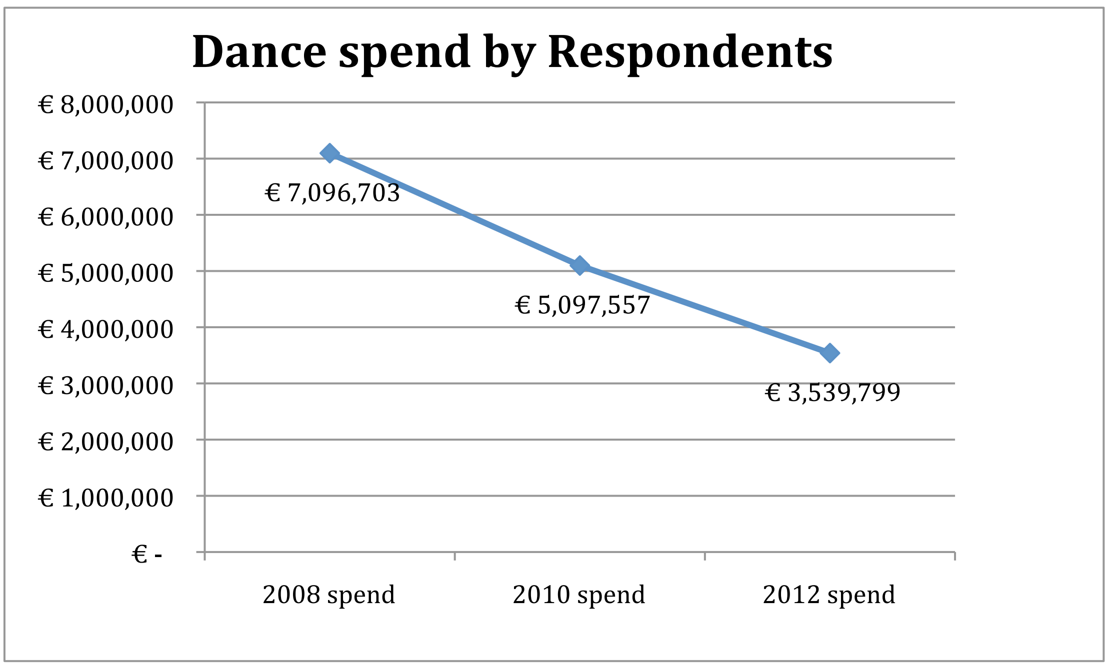


FIGURE 1 – trends in dance spend by respondents included in Dance Counts over the three surveys

However, it remains the case that the respondent organisations in this survey are responsible for a significant number of dance audiences, participation and spend, generating total audiences of over 150,000 for dance performances, classes and outreach activities, and investing over €3.3million in dance spend in 2012. As such the findings contained within are notable.

KEY FINDINGS

Employment in dance organisations

490 people worked for the respondent member organisations in 2012, according to the surveys completed and returned to us. As this is derived from approximately half of Dance Ireland's organisational membership, we would estimate the overall employment figure to be higher.

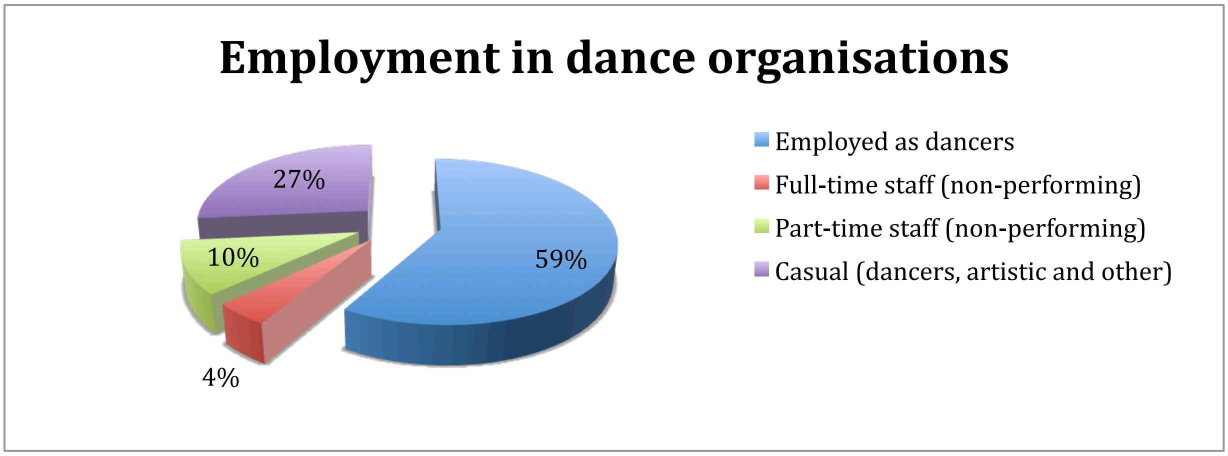


FIGURE 3 – employment by respondent dance organisations

While the ratios between the kinds of employment have remained similar throughout all three Dance Counts, the overall number of jobs has fallen significantly, particularly between 2010 and 2012. While this can be somewhat explained by the drop in organisations responding to date in 2012, it is nonetheless a negative trend.

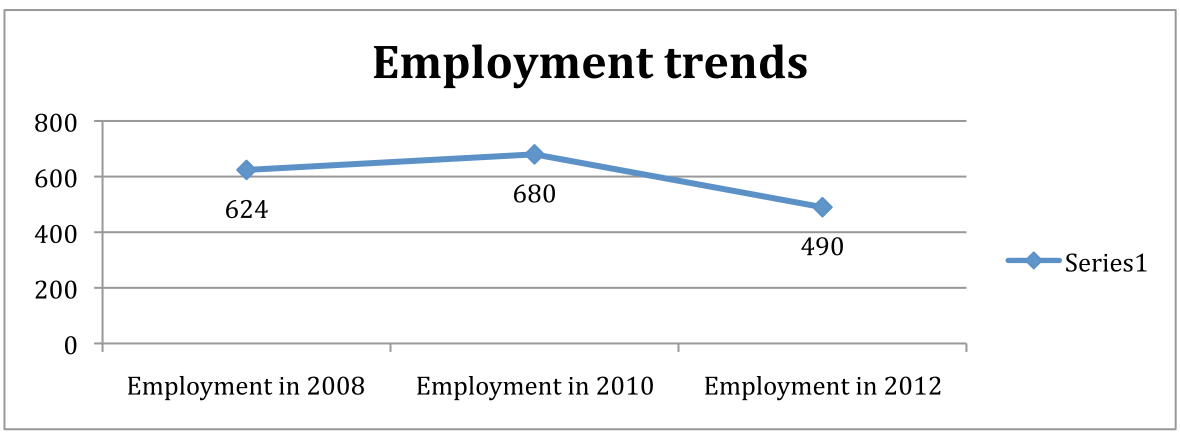
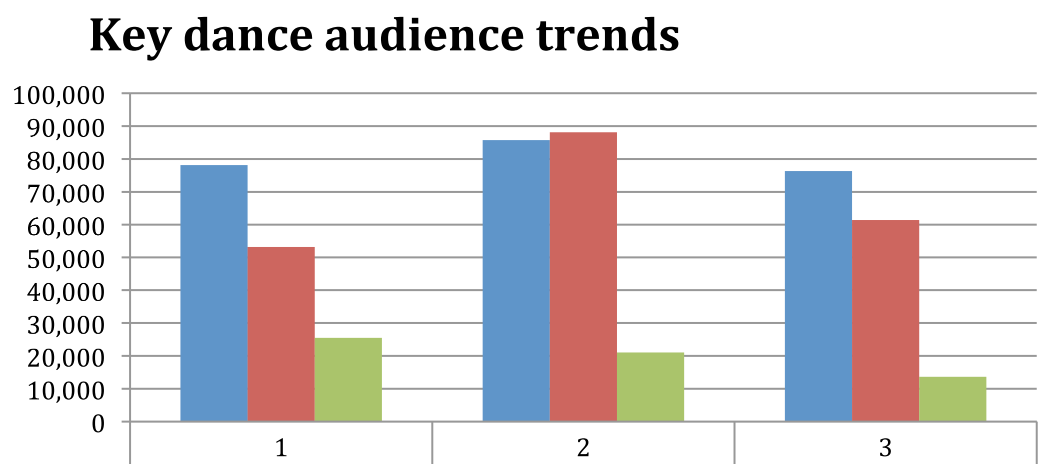


FIGURE 4 – employment trends

The drop in employment, at 74% of 2008 levels, did not fall nearly as significantly as organisational turnover, which may indicate people working for substantially less pay or indeed for free. The dearth of full-time jobs in the sector has also been exacerbated; just 4% of jobs are full-time compared with 9% in 2008.

Dance audiences

Respondent organisations attracted total audiences of **151,316** to their 2012 activities.
76,323 came to 532 performances and talks, 61,345 attended non-professional dance classes and 13,648 were reached through outreach programmes.



	1	2	3
Performance/talks attendance	78,126	85,739	76,323
Dance class attendance	53,233	88,083	61,345
Dance outreach attendance	25,511	21,058	13,648

FIGURE 5 – total respondent dance audiences over the three Dance Counts surveys: 1=2008, 2=2010, 3=2012

Over the last six years, audiences for performances / talks have remained relatively fairly constant, which is admirable given the significant reduction in dance spend by respondent organisations. However, as can be seen in Figure 6, (next page) there has been a 25% reduction in performance events and significant increase in talk events (which have more than quadrupled since 2008) presented by dance organisations.

As average event attendance has remained constant at approximately 150 per event, we can conclude that the additional talk events have played a significant role in performance/talks audiences remaining over 70,000. There may also have been other factors that were not queried in the survey – for example ticket price reduction, the presentation of free events, etc – that may have contributed to the retention of audience levels in 2012.

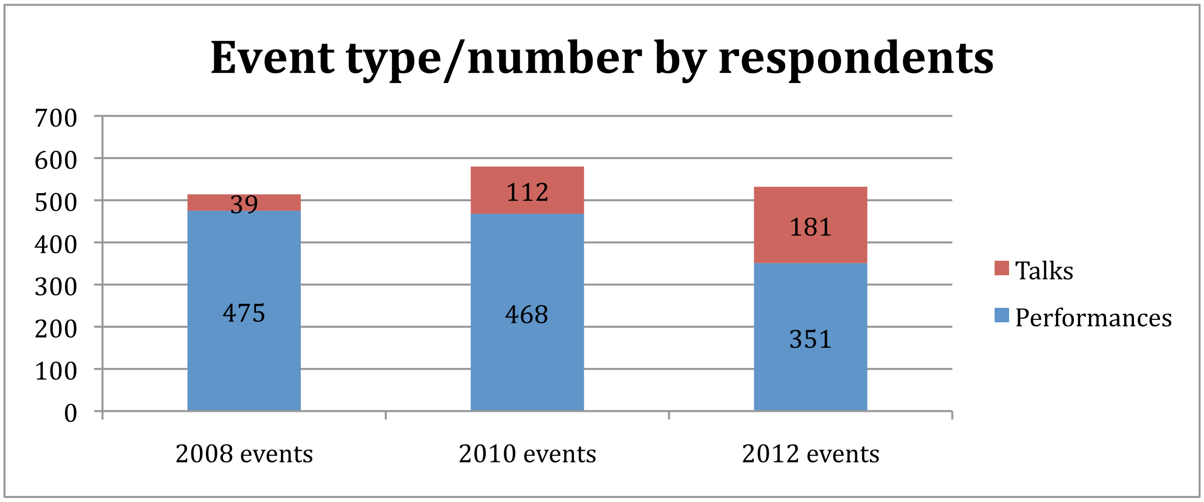


FIGURE 6 – comparison of performance/talk events run by respondents over the three Dance Counts surveys

Dance class attendance has come down from the high of over 88,000 in 2010, but remains higher than 2008 attendance. The drop since 2010 may be explained by organisations still to complete this year's survey. Provision of dance classes tends to be an income generator for dance organisations, and is therefore generally retained as part of their programme. The fact remains that dance classes are now a key driver of audiences to dance, and therefore present a marketing/audience development challenge for all organisations.

The clear loss in terms of dance audiences over the last six years is those reached through outreach programmes. Outreach activity may be considered ancillary by dance organisations when finance / resources are scarce, and as such may have been the first area to be retracted. If so, it is clear that this is the audience hardest hit by reductions in dance funding since 2008.

While the respondent organisations varied hugely in terms of the size of their audiences, the number of events staged and the levels of dance class and outreach activity, on average, respondent dance organisations attracted audiences of 2,936 to performances/talks, 3,057 to dance classes and 803 through their outreach activities – engaging with an average of almost 7,000 each in 2010.

Dance funding and spend

The overall spend on dance in 2011/12 by the organisation respondents was €3,539,799 This is a reduction of over €3.5M from the 2008 spend of €7.136M by respondent organisations in 2008, a reduction of 50%.*

The Arts Council remains a key source of funding for respondent organisations. Arts Council funding for dance was €4m in 2008, €3.2M in 2010 and €2.88M in 2012: a 31% reduction since 2008. Reliance on Arts Council funding among respondents is, on average, 53%: it has not returned to the 58% reliance in 2008 but has increased slightly from its 51% reliance in 2010.

While earned income has increased slightly (from 27% to 29%) since 2008, reliance on public funding of some sort remains high at 63%.**

In addition, the 6% unaccounted-for funding source may also be public funding of some kind.

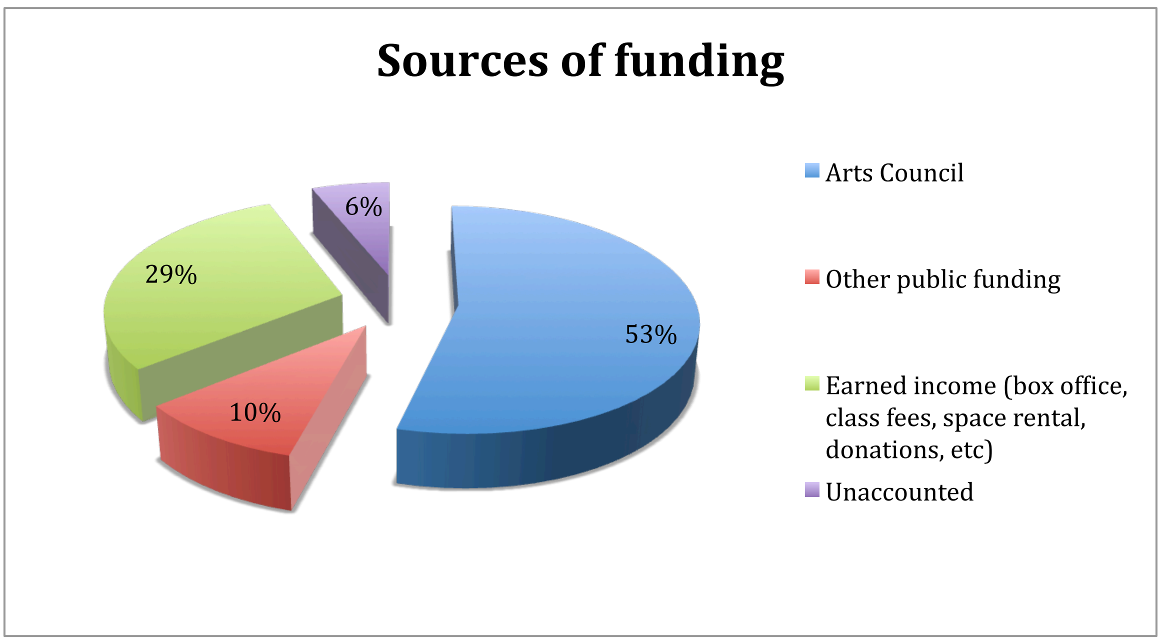
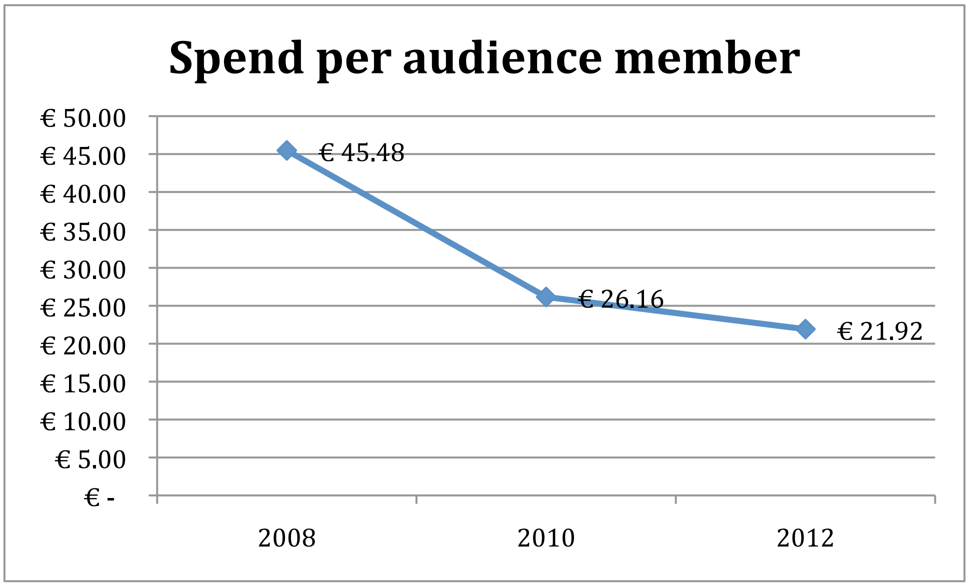


FIGURE 7 – Respondent organisations' sources of funding

Average spend per audience member continues to fall, from €45.48 in 2008 to €21.92 in 2012.



Organisations have only dropped total audiences by 3% while dealing with spend decreases of 50%, so obviously spend per audience member would have to fall substantially. The survey did not ask about if respondents felt their audience interactions had diminished in quality so we are not certain of the impact on dance audience experiences of this decreased spend-per-audience.

** Note: Some of this reduction in spend can be explained by the four organisations yet to complete the 2012 survey, who had a combined spend of approx €1.2m in 2010. If we estimate that those organisations had a combined turnover of €1m in 2012, dance spend would still be down by 36% since 2008.*

*** Note: Reliance on Arts Council funding varied hugely among respondents: from one organisation being 84% reliant on the Arts Council to another whose Arts Council funding was 0% of their total operating cost. The vast majority of respondents were between 30% and 70% reliant.*

INTERIM REPORT ENDS